TOKN

connect your workforce

FAQ for Console

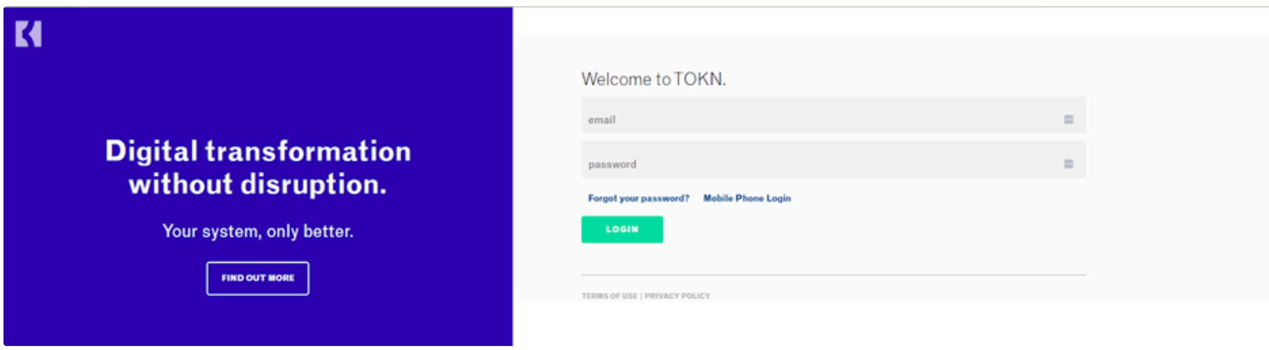
FAQ for Console

Q: What is the TOKN Console?

The TOKN console is the administration application that runs on the TOKN cloud. The console application is used to administer the TOKN services for your organization. The TOKN management console includes the following capabilities: establishing integration between systems, creating, and modifying Apps, enrolling services, managing application life cycles, spinning up application databases, adding end users and user maintenance, and controlling connected devices and assets.

Q: How do I sign into the TOKN Console?

You must log in to the TOKN Console (Console) with your credentials as in the figure below;



Q: What does an Instance mean in the TOKN Console?

Most companies will have three instances Development **(DEV),** Quality **(QAS),** and

Production **(PRD)**.

DEV stands for development, where initial testing takes place by the TOKN staff.

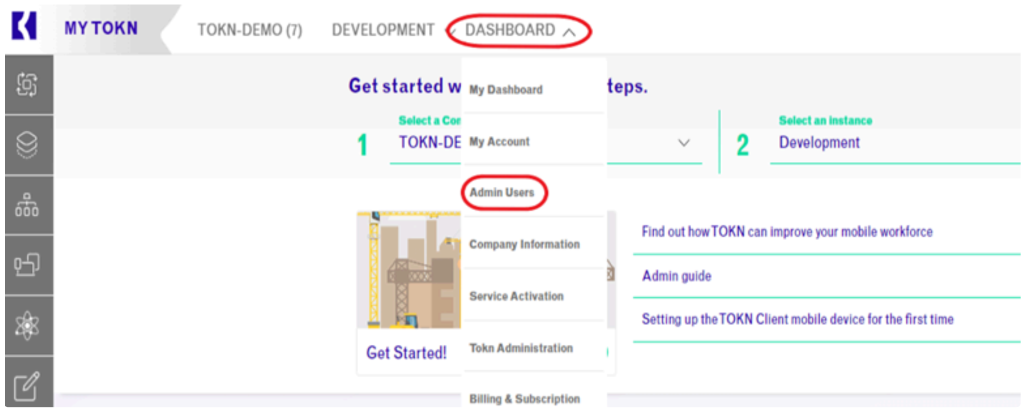
QAS stands for Quality, where all the testing takes place by the company.

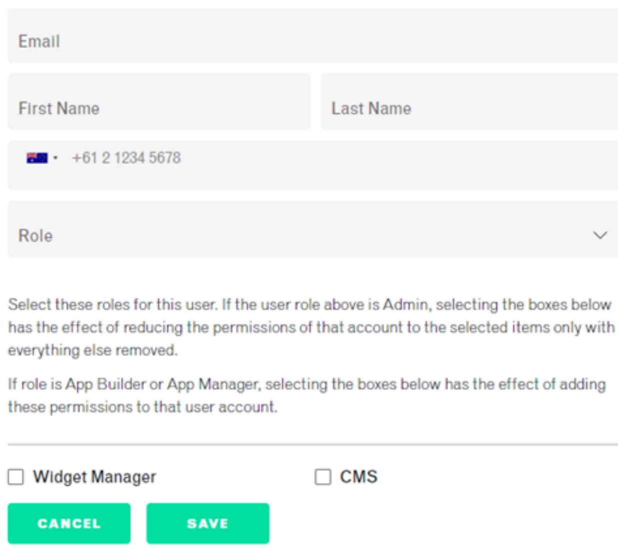
PRD stands for Production and this instance is the live instance (where you will be working).

Q: How the admin users can be added to the console?

Admin users have access to the TOKN Console. They have full access to all the Console features by default, which can be managed by changing their permissions. Admin users may also be a user in Workflow. If they are, they will be able to use TOKN Apps that are assigned to the groups that they are assigned to.

The Admin User Page can be accessed by selecting the admin user option from the Dashboard drop-down list on the navigation bar.





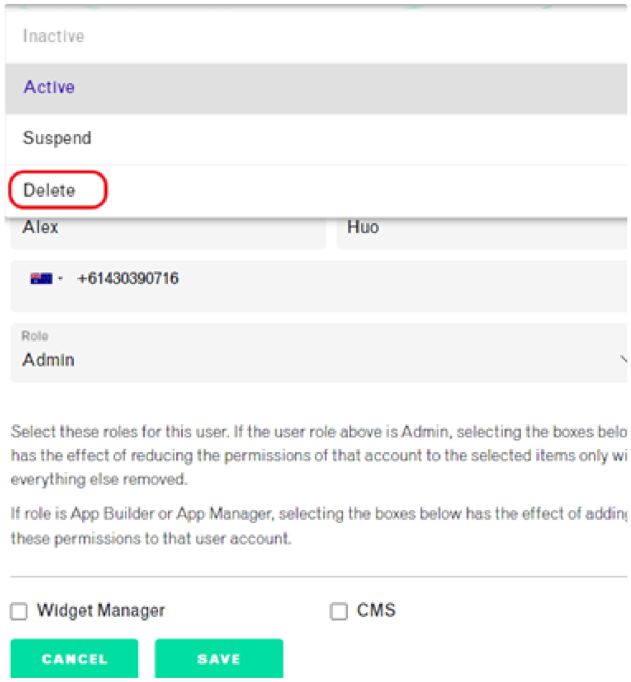
Q: How the normal users can be added to the console?

Normal users will only be able to use TOKN Apps that are assigned to the groups that they are assigned to. They can not access the console. Only Admin users can add the normal users in the console.

Q: How to delete/edit an admin user?

To Delete or Suspend an Admin User, the Admin User needs to change the user's status.

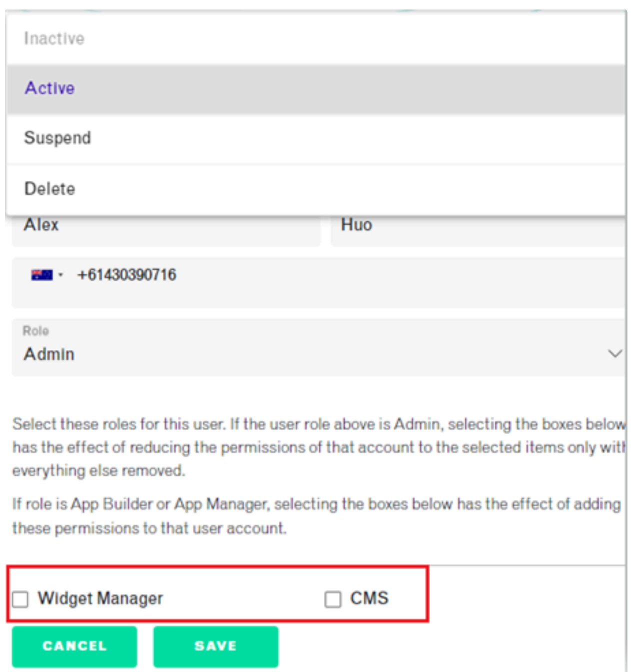
Click the user that you want to delete, then click on the Status field on the drop-down box at the top of the page select your option and click save to complete the process.



To edit admin user details, first name, last name, phone number, and role of the user, click save to complete the process.

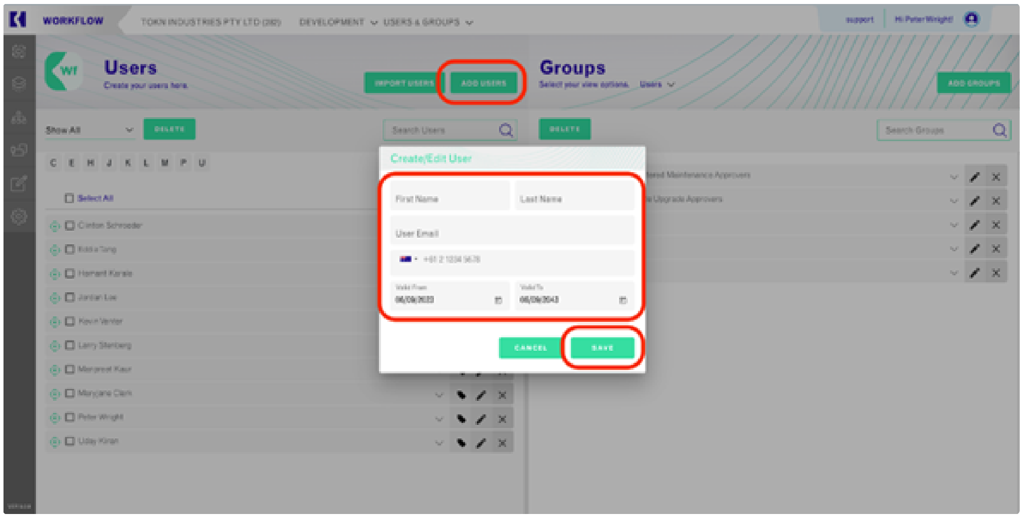
The checkboxes will give explicit access to the one that has been selected.

If nothing is selected, then the admin user has access to everything.



Q: How to add APP users?

To manually add APP Users, click on Workflow and then ADD USERS. Fill in all the required details and click on SAVE.

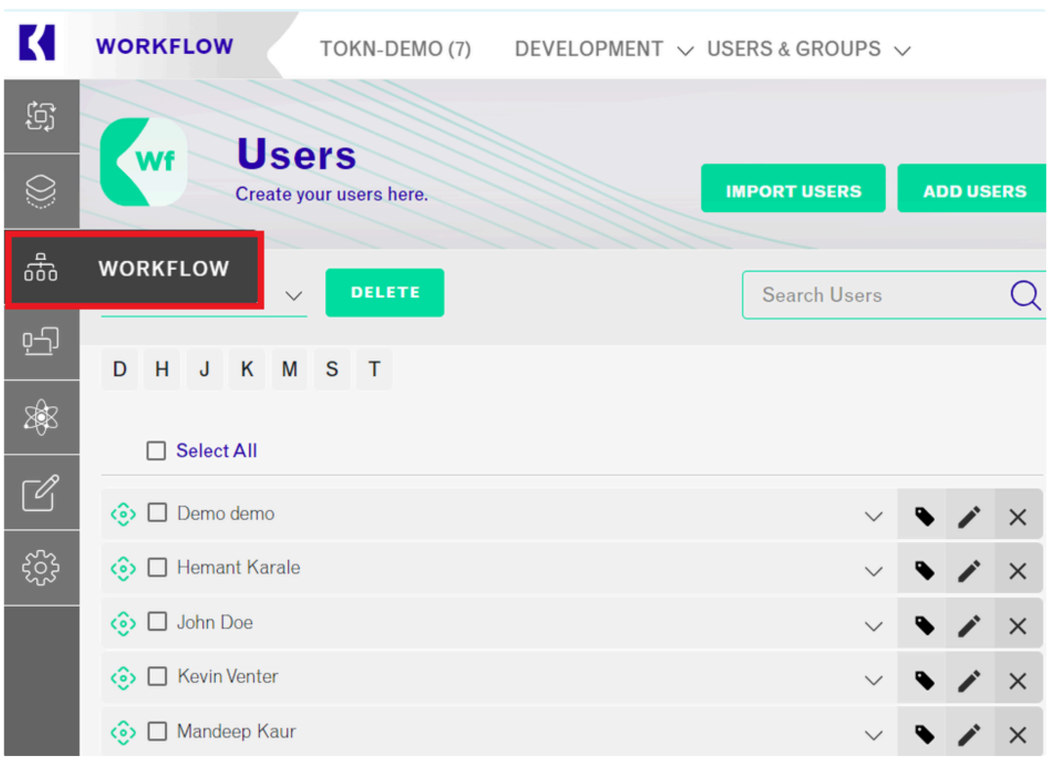


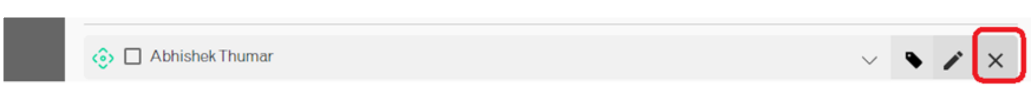
There is also a User Sync Service. This is an extra option where a daily sync automatically occurs at a set time and all changes made in your connected systems will be updated.

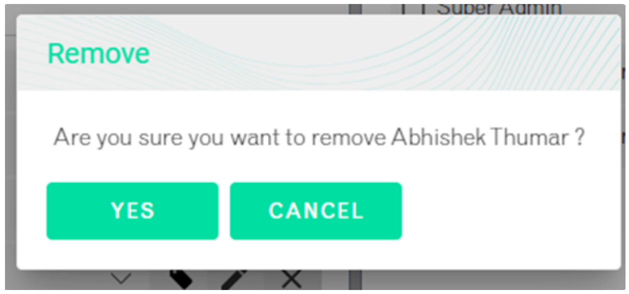
When the user logs into the App for the first time they will be required to enter their mobile number, they will then receive a text message with the personal login code, which they can use for future logins.

Q: How to edit/delete APP users?

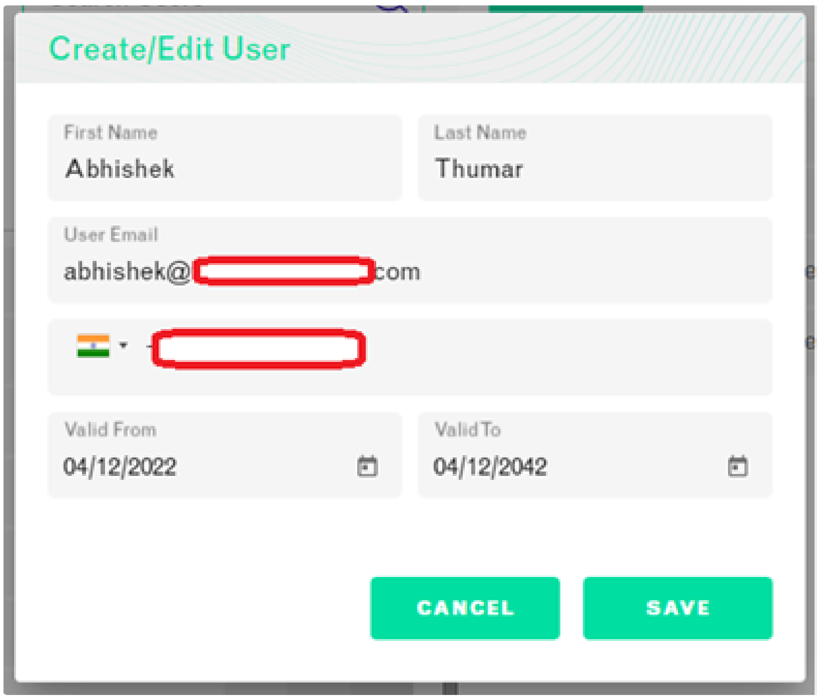
To delete an APP user, click on the Workflow, and click on 'X' in front of the user whom you want to delete, and click on the Yes option.







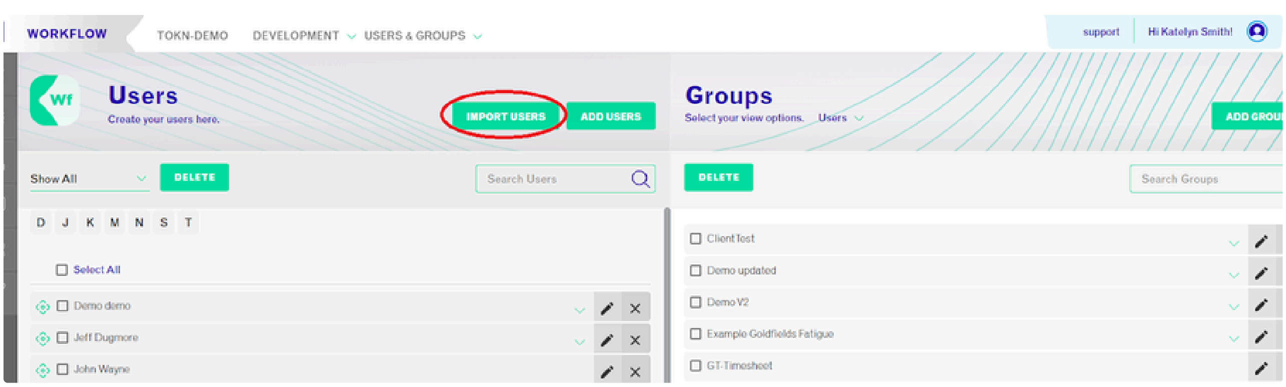
To edit the existing user's information, click on the pencil icon fill in the updated detail, and click on the save button.



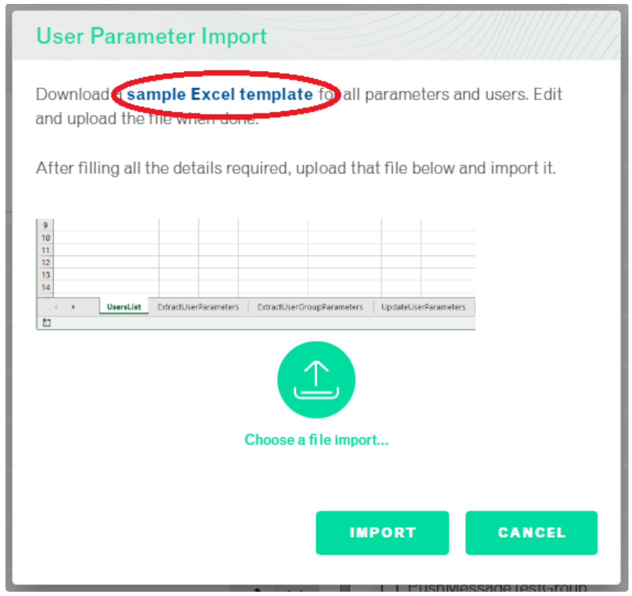
Q: How user list can be imported to the console?

To import users in bulk:

1. In the TOKN Workflow Module, select the 'Import Users' Button at the top middle of the page.



2. Download the sample Excel template



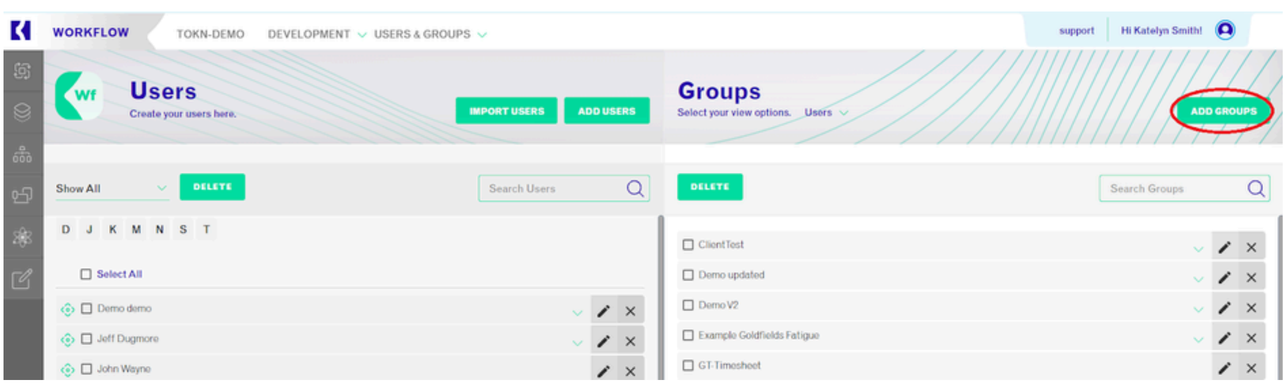
3. Fill out the 'UsersList' tab of the spreadsheet with the users' email, first name, surname, validity dates, password, active directory status, and mobile number.
4. Save and upload the spreadsheet and select 'Import'.

The Console will tell you when the import is complete and show you how many of your user imports were successful and how many failed. To find out more, select the 'Download import log' to view any errors on the upload.

Q: How to set up a new group in the console?

To add a group:

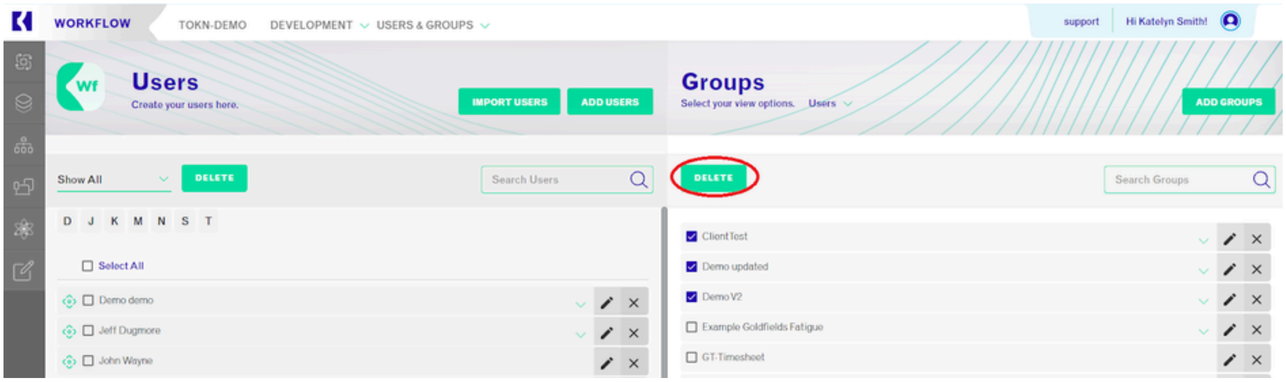
1. In the TOKN Workflow Module, select 'Add Group' in the top right-hand of the screen.



2. Enter a Group Name and a Group Code, then select 'Add'. This will create a new group.

Q: How to delete an existing group?

1. To Delete a Group, select the checkbox next to the group(s) you would like to delete.
2. Select 'Delete' in the top middle of the screen.



Q: How to edit an existing group?

1. To edit a group select the pencil icon to the right of the group you would like to edit.

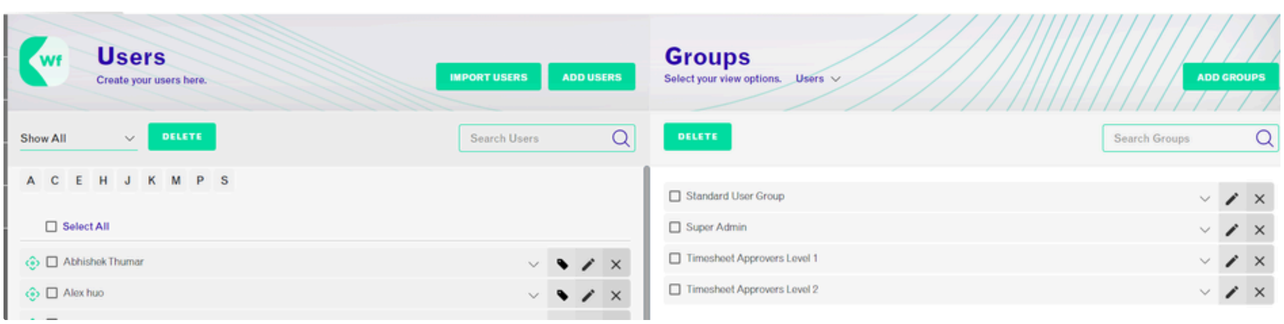
2. Edit the group's details and select 'Save'.

Q: How users can be assigned to a group?

Admin can add users and assign them to groups to perform functions on the APP.

The list of users (left) and Groups (right) is seen on the Workflow screen.

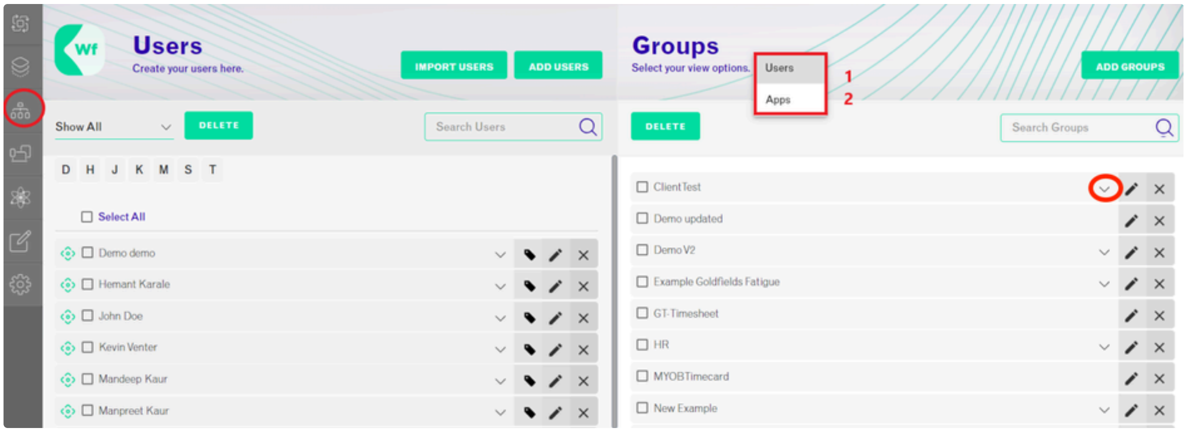
1. To assign a user to a group, select the user from the left side of the screen and 'drag' them across to the group on the right that you would like to add them to and release on top of that group. You will see the user appear under the group's drop-down.
2. You can add multiple users to a group at once by selecting the check box next to the users and dragging them all across at once.

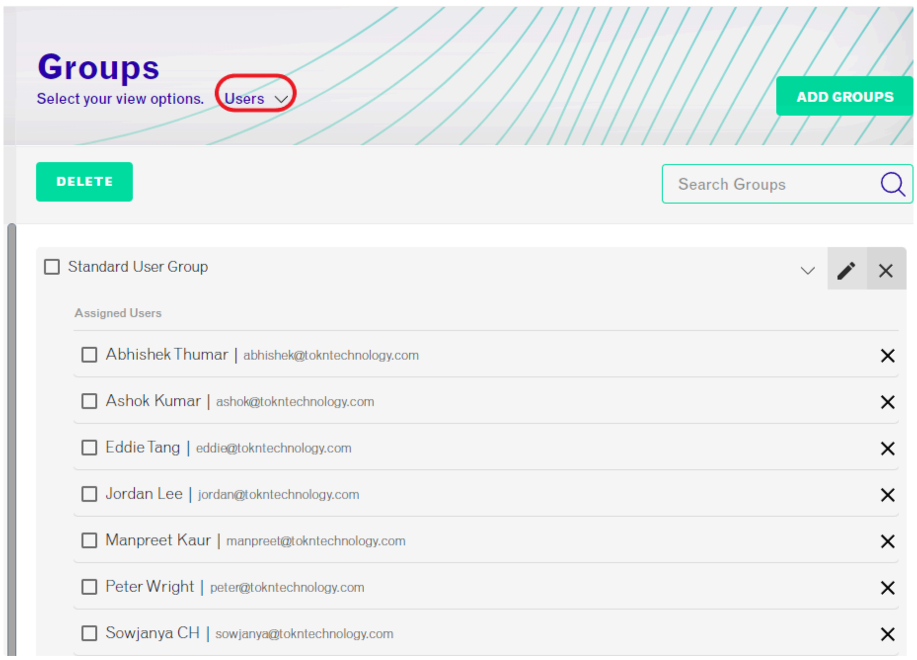


Adding users to a group

To check which users are assigned to groups;

Admin users can select the user's option from the drop-down list (#1 below) and then click on the dropdown arrow for the group.





List of users under a particular group

Q: How a user can be deleted from the assigned group?

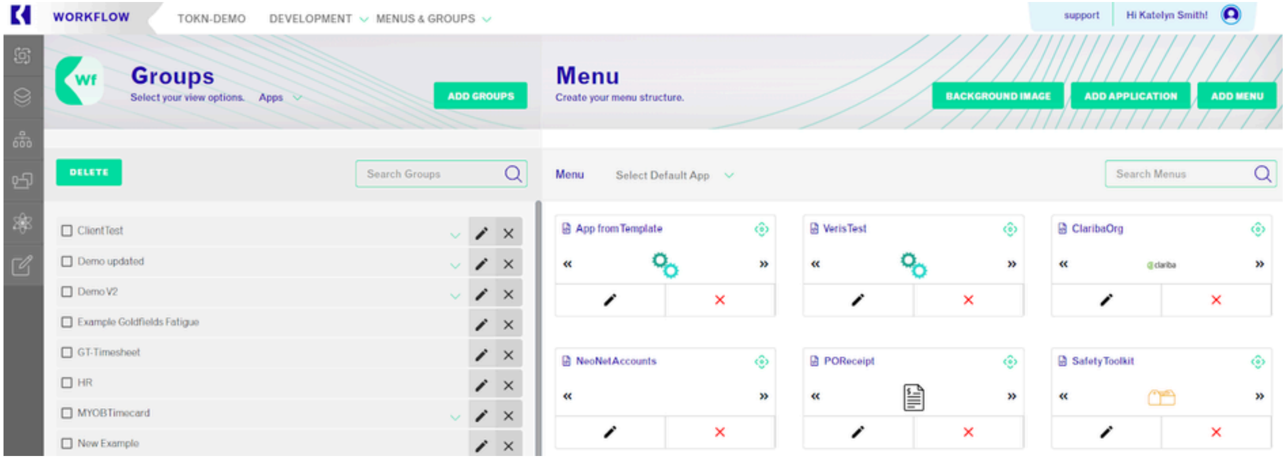
1 - To remove a user from a group, select the drop-down of the group to see all the users in that group.

2 - Select the ‘X’ next to the user you would like to remove from that group.

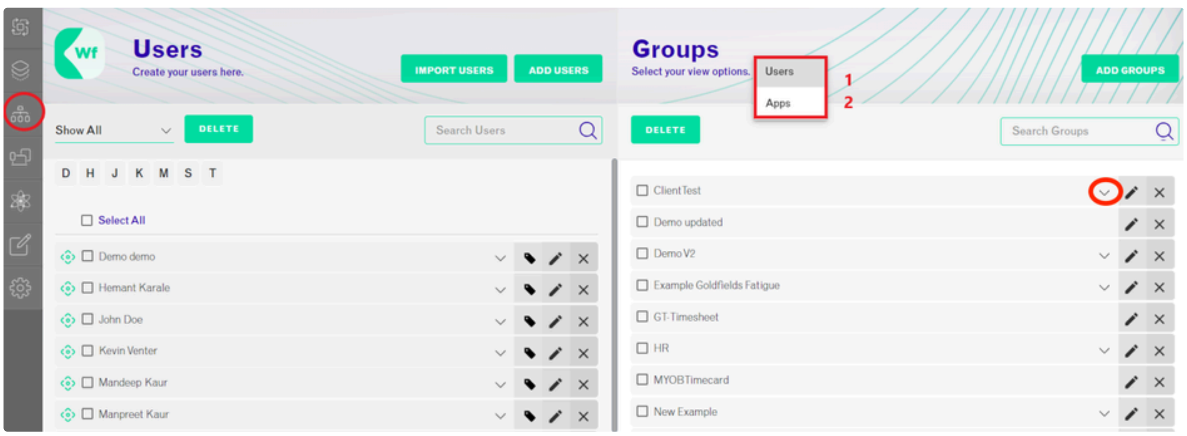
3 - Select ‘Yes’ on the pop-up.

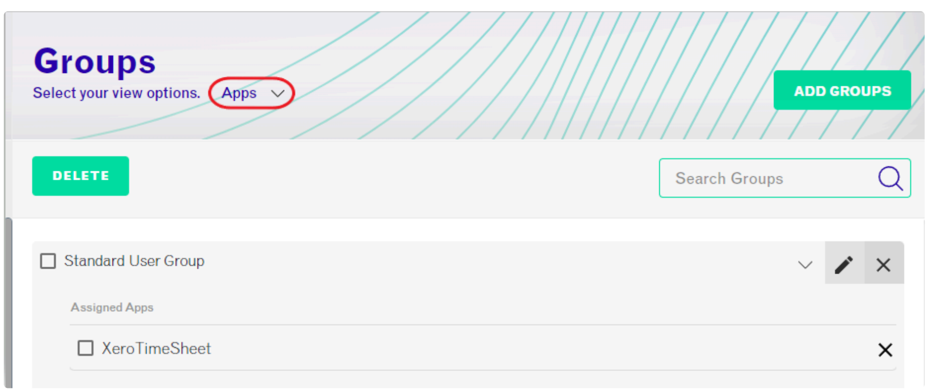
Q: How to assign an APP to an existing group?

1 - In the TOKN Workflow Module, at the top of the screen you will see ‘Users and Group’. Select this and a drop-down will appear. Select ‘Menus & Groups’. This will show you a list of groups on the left of the screen and a list of apps on the right of the screen.



To check the Apps associated with each group, select the Apps option from the drop-down list (#2 below) then click on the dropdown arrow for the group.

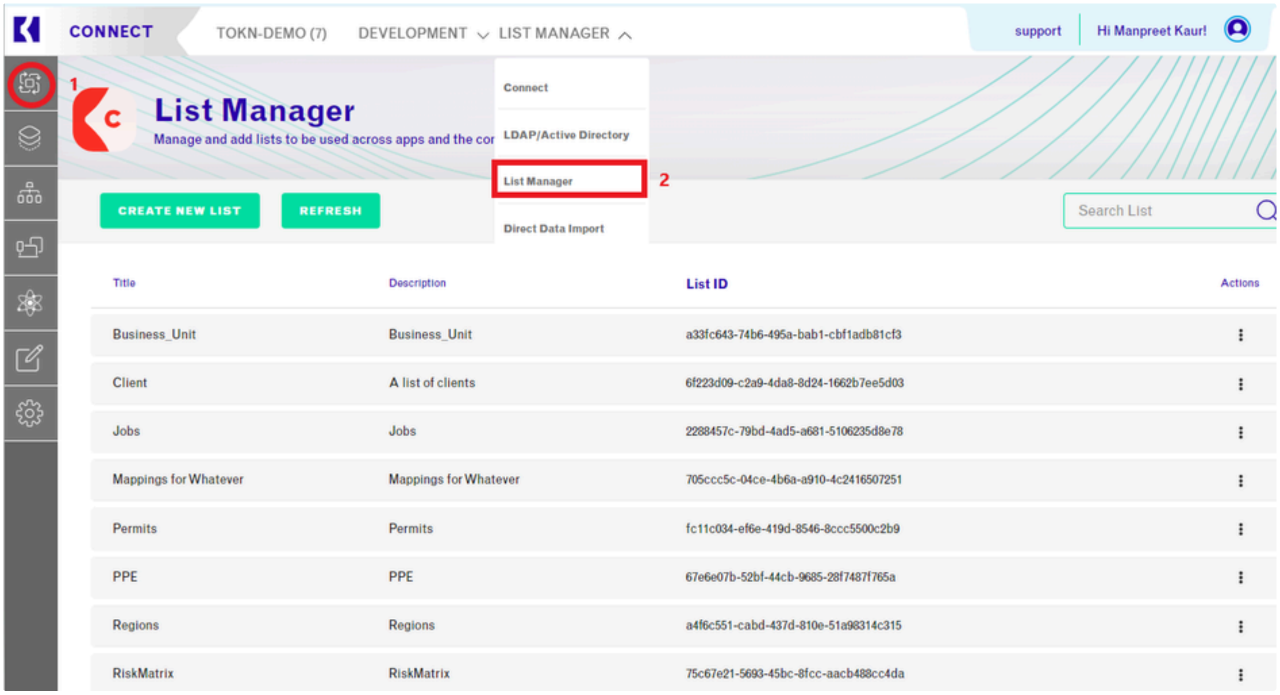




Q: What is a list manager?

The TOKN List Manager is a piece of functionality that allows the management of any kind of list. Different lists can be created under the list manager.

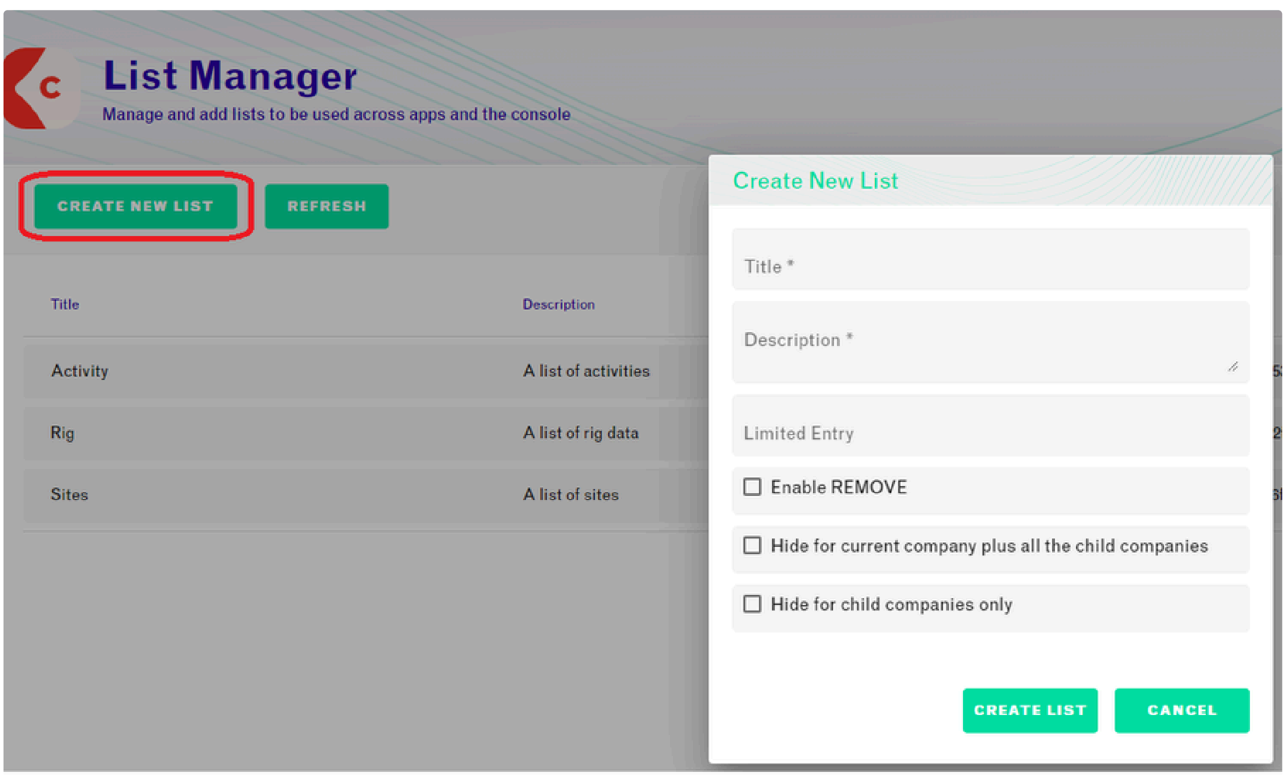
Path for list manager - CONSOLE -> CONNECT -> LIST MANAGER



Q: How a list can be created?

To create a new List, click on Create New List fill in all the required details, and click on Create a List.

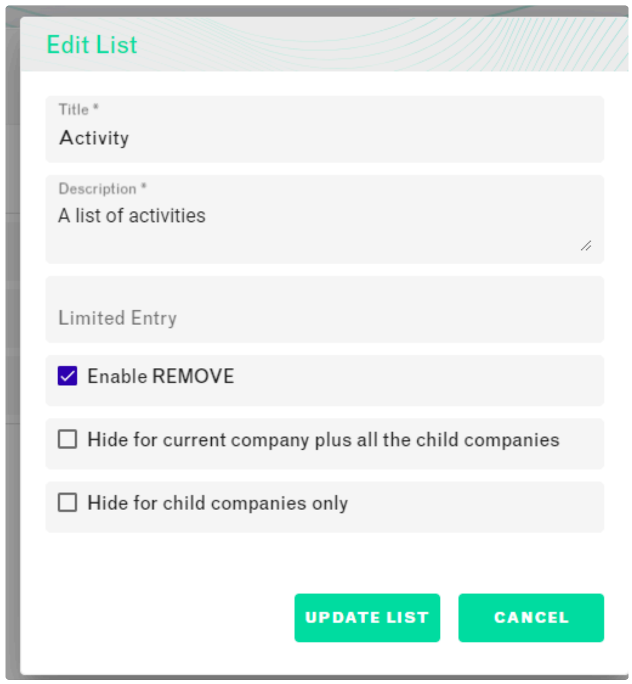
The Tokn developers would also need to map the List Manager to the relevant field within the APP.



Q: How an existing list can be edited?

To edit an existing list, click on the three dots, click on the edit button, and fill in the updated details.

Figure: Edit a list (Console View)



Q: How new items can be added to the existing list?

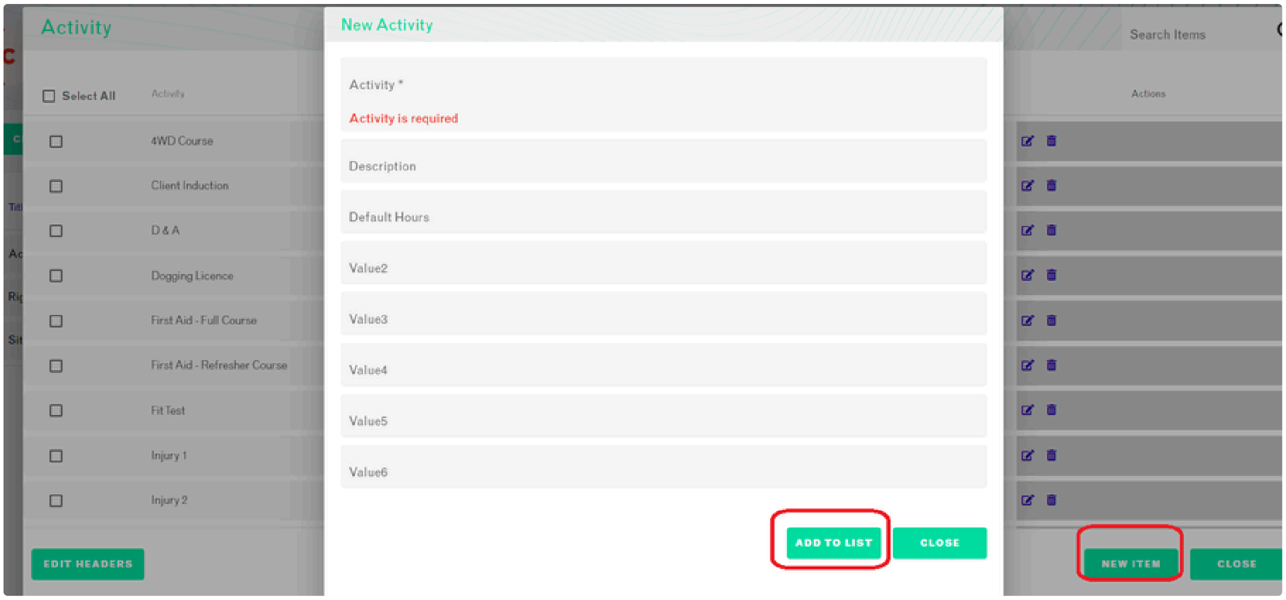
If we want to add new data to an existing list; e.g., we have a list named Activity list and to add data to the Activity list need to perform the following steps:

Click on the “Activity“ list.

Then NEW ITEM, filling in the Title, description, and required values.

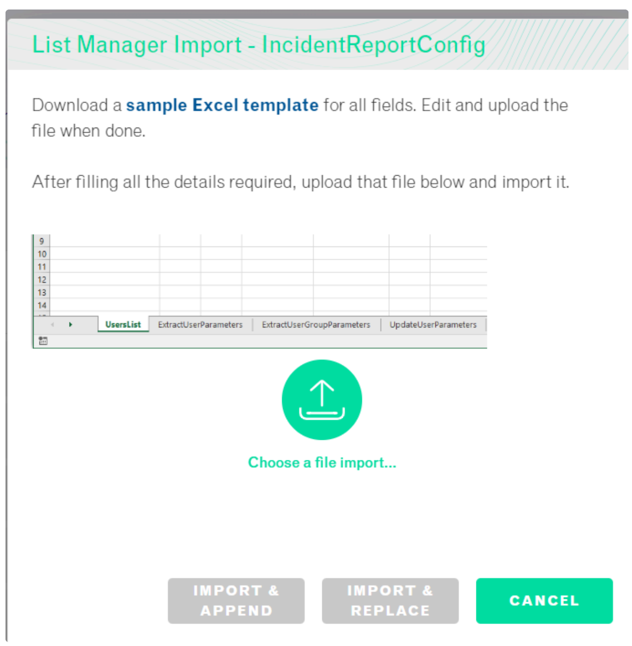
Click on ADD TO LIST to upload

(Users would need to refresh the APP for the new data to show)

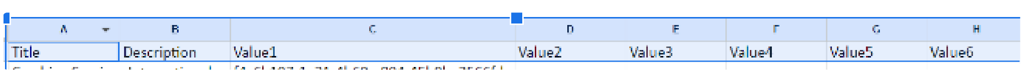


Q: How a list can be imported to the list?

To import a list, click on the three dots, click on the import option, click on the Choose a file import button import a file, and click on the Import and Append button. The uploaded data will show under the list.



When we upload any Excel file, the title should be the same as in the console.



Q: How a list can be exported from the console?

To export a list to Excel, just click on the three dots and click on the export option, it will automatically download.

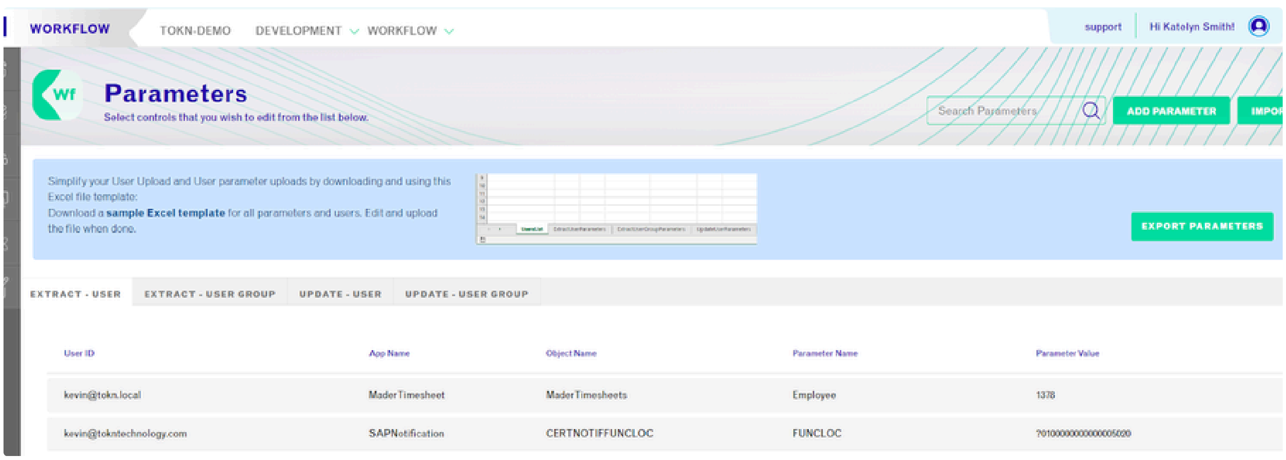
Q: What are the Parameters in the TOKN console?

A parameter is a set variable endpoint that is specific to a user or user group. This allows a high degree of flexibility in how a user can view their data in an app. Adding a parameter allows you to create a new variable URL specific to the user.

Q: How parameters can be added manually if User Sync services are not available?

In the TOKN Workflow Module, at the top of the screen, you will see ‘Users and Group’. Select this and a drop-down will appear. Select ‘Parameters’. This will show you a list of existing parameters.

WORKFLOW > USERS & GROUPS > PARAMETERS

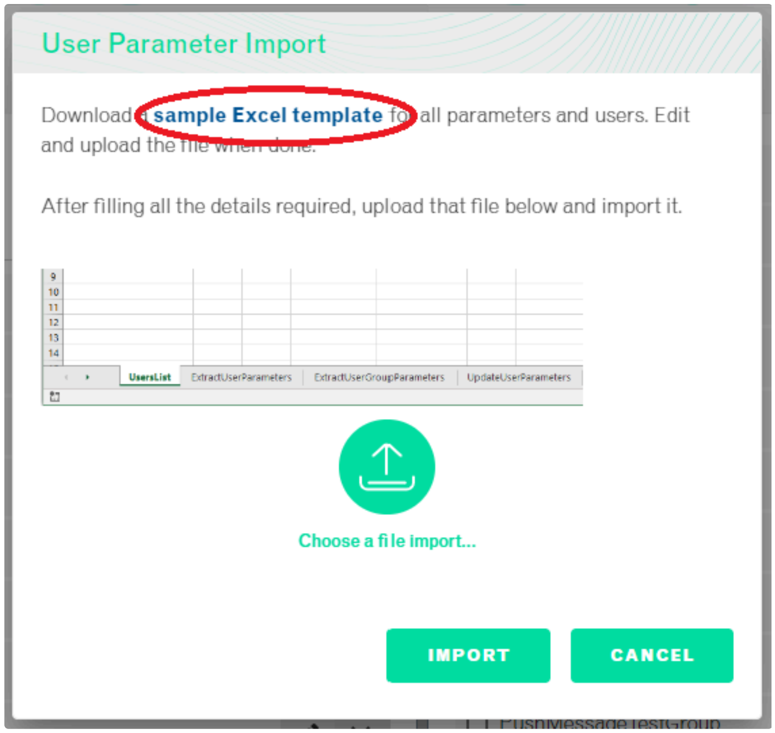


1. Select ‘Add Parameter’ in the top right hand of the screen.
2. Select the app and object that you wish to use for this parameter.
3. Choose an existing parameter, or create a custom parameter based on what kind of user data you need to display.
4. Create or select a parameter name. Enter your parameter value and data type.
5. Select the user you wish to apply the parameter to.
6. Click on ‘Save’.

Q: How a parameter list can be imported?

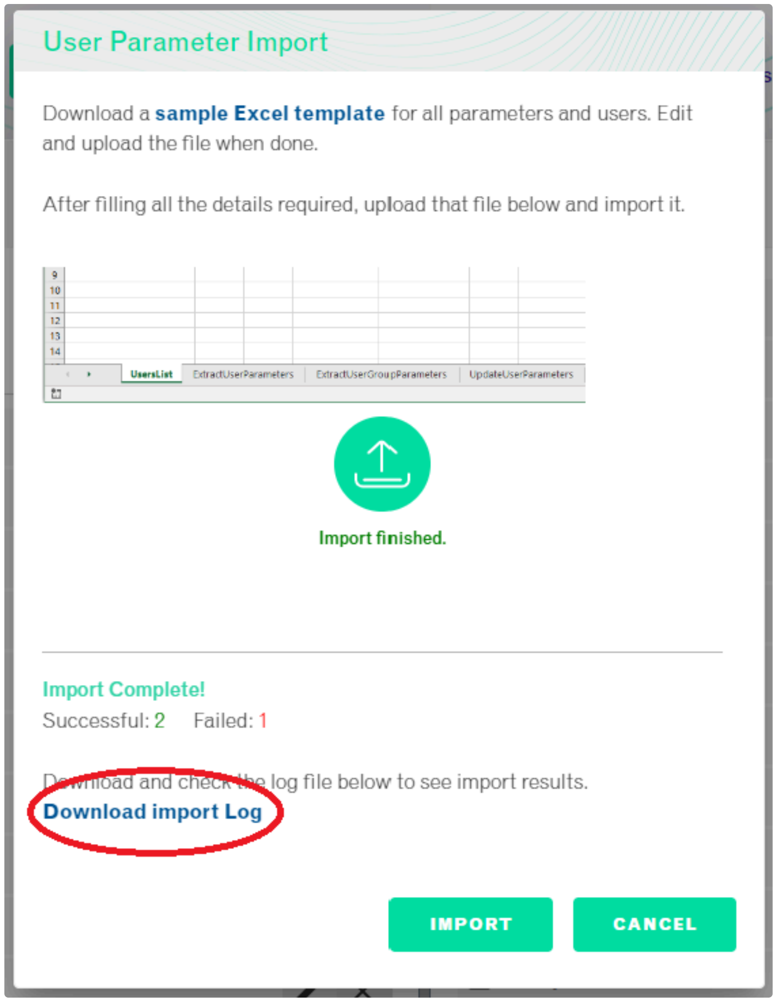
To import parameters in bulk:

1. On the parameters page, select ’import’ in the top right-hand corner of the page.
2. Download the sample Excel template



3. Fill out the ‘Extract User Parameters’ with the Company Information, UserID, App Name, Object Name, Parameter Name, Parameter Value and Data Type.
4. Save and upload the spreadsheet and select ‘Import’.

The Console will tell you when the import is complete and show you how many of your user imports were successful and how many failed. To find out more, select the ‘Download import log’ to view any errors on the upload.



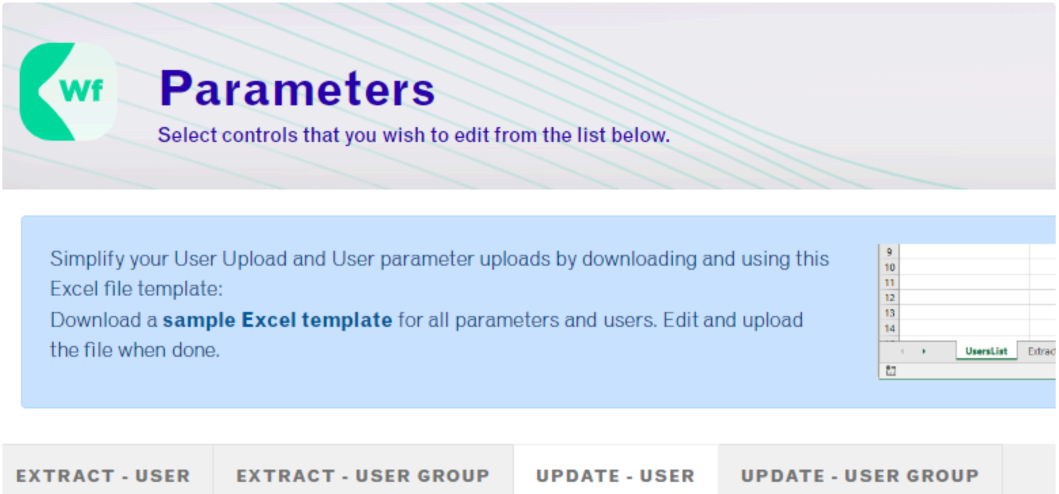
Parameters can also be added to user groups on this spreadsheet by following the same process and filling out the ‘Extract User Group Parameters’ tab.

Q: How Parameters can be updated?

Parameters can be updated by user or by user group.

To update a parameter individually, this can be done in the TOKN Console.

1. On the parameters page, you will see 4 tabs.

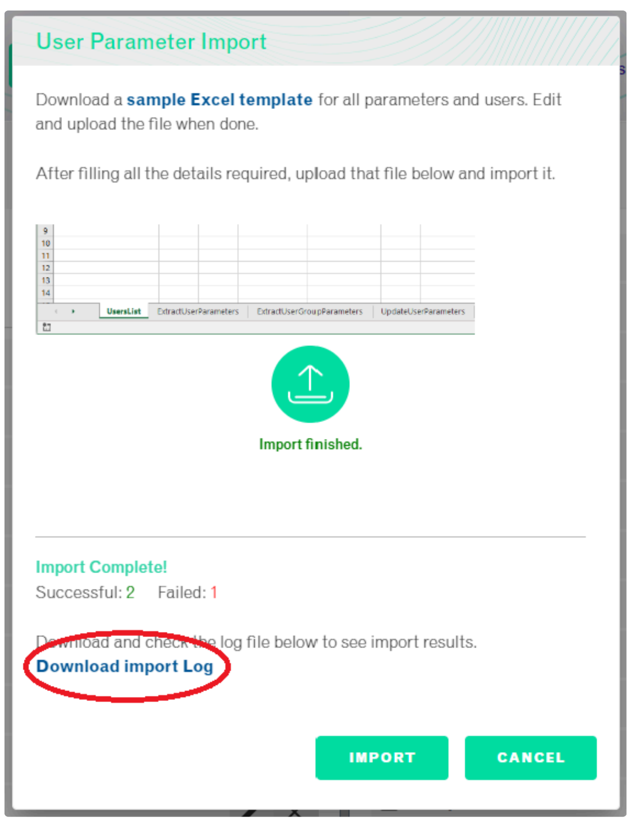


2. Select the ‘Update - User’ to update an individual user or ‘Update - User Group’ to update a user group.
3. Select the individual User or User Group and update the details you wish to change.
4. Select ‘Save’ when you are done.

To update a parameter in bulk, you can use the same downloaded Excel template as above.

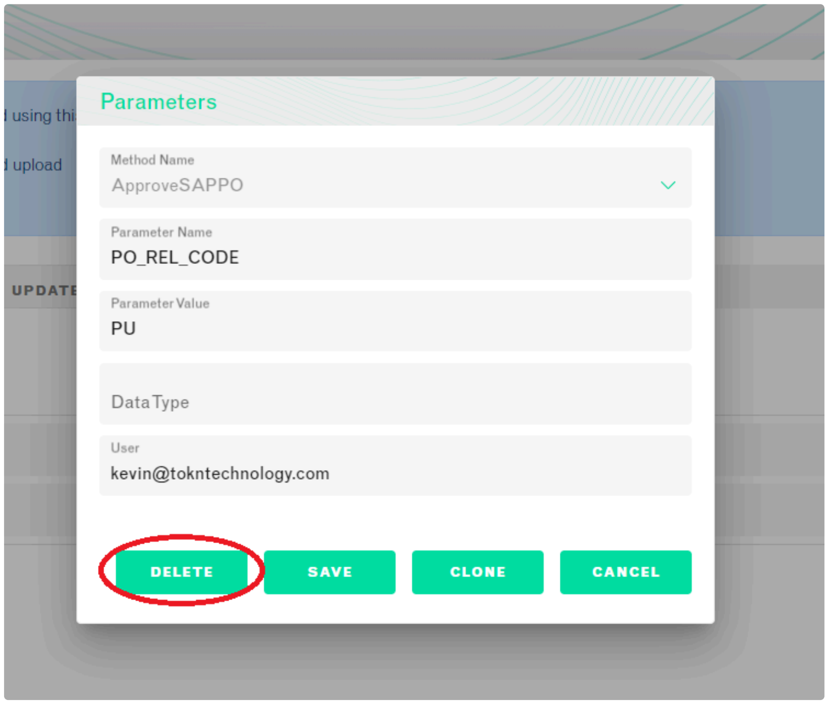
1. Select the ‘Update User Parameters’ to update users or ‘Updated User Group Parameters’ to update groups.
2. Enter the details for the users or groups that you wish to update.
3. Save and upload the spreadsheet and select ‘Import’.

The Console will tell you when the import is complete and show you how many of your user imports were successful and how many failed. To find out more, select the ‘Download import log’ to view any errors on the upload.



Q: How an existing parameter can be deleted?

1. On the parameters page, select the parameter you would like to delete.
2. Select ‘Delete’ and then ‘Yes’.

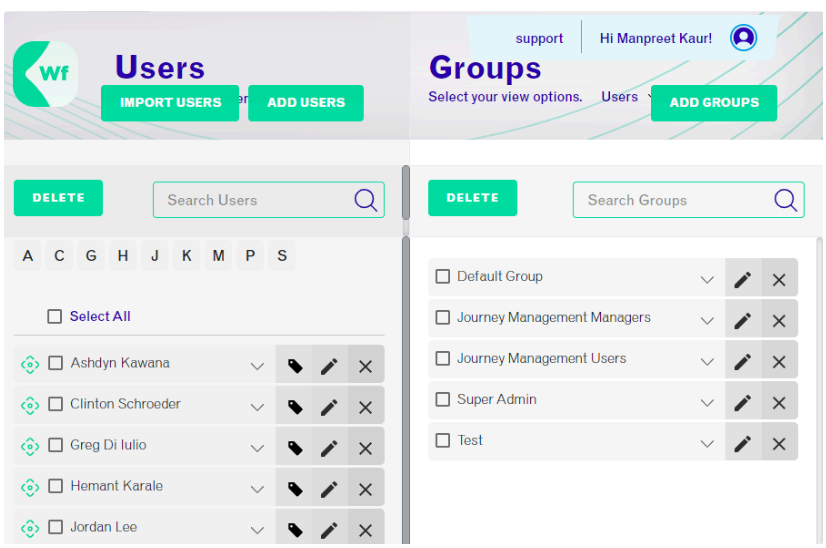


Q: What is a User Sync Service? How user sync services can be run?

This service uploads users and their parameters into TOKN, assigning them to the “Standard user group”.

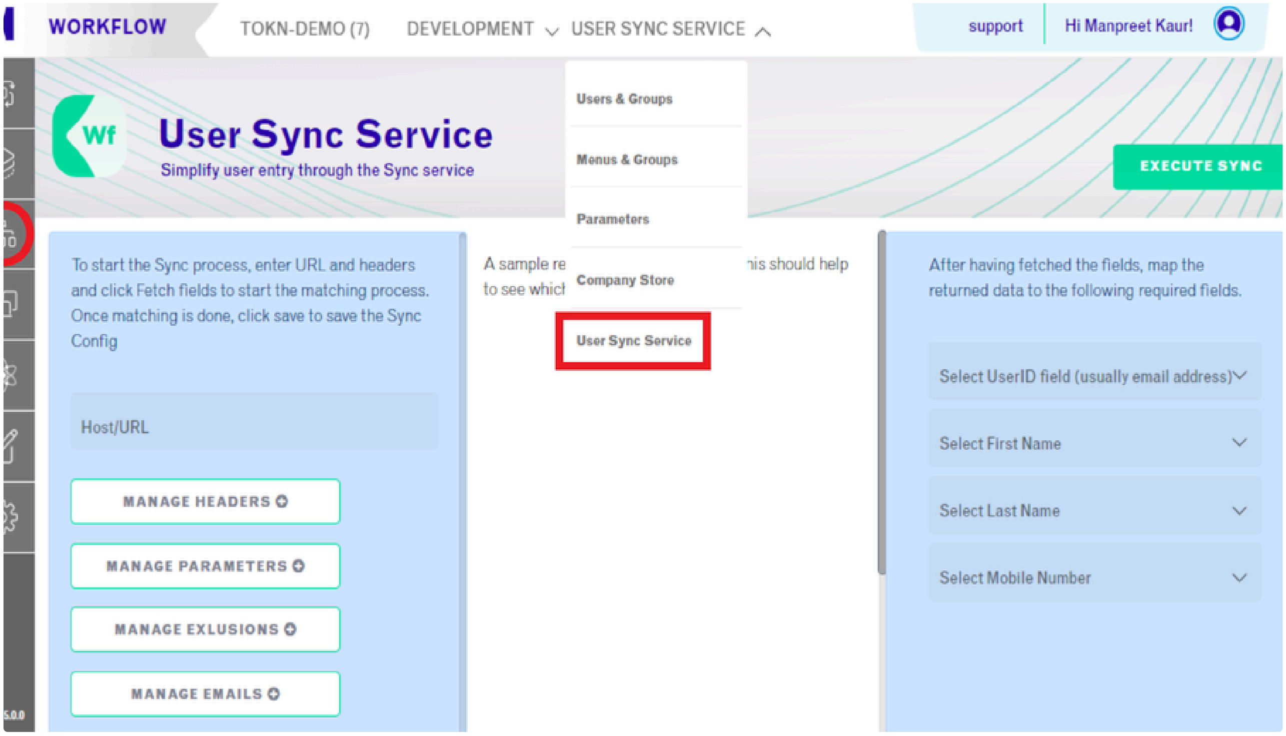
This automated service runs at a specific time daily.

An email log fired after running the user sync service each time. It includes information about who has been added to TOKN, what the parameter is, and which group is assigned to. In addition, an error message will explain why a user cannot be added to TOKN in the email.



Q: How the User Sync Services can be run Manually?

The User Sync services can be run manually. Click on the workflow and select the User Sync Service.

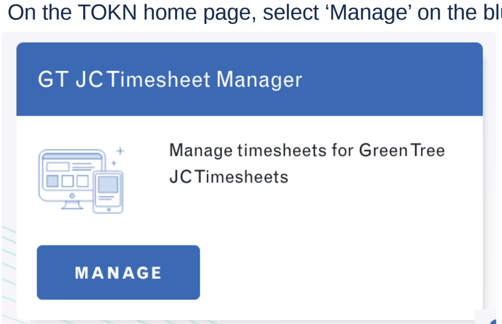


Q: How to view submitted timesheets?

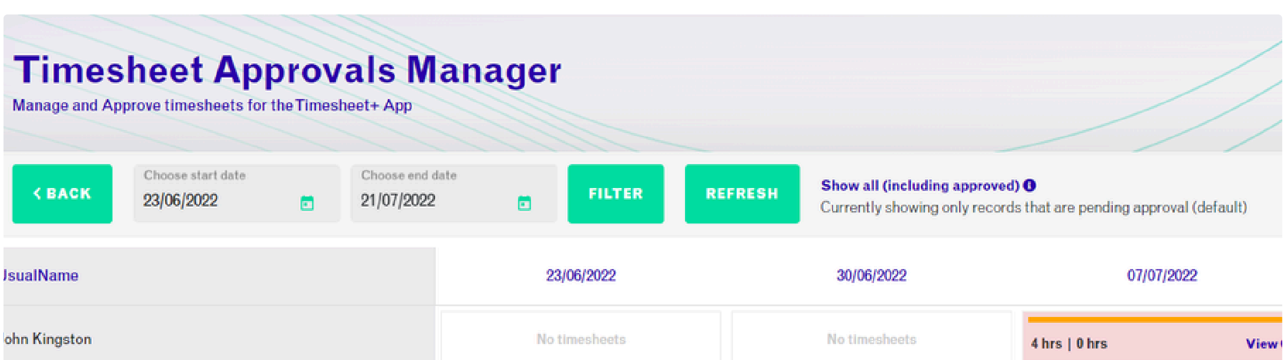
The Timesheet Manager Widget is used for managers/administrators to approve submitted timesheets before they are sent to a connected accounting system. This can be used as a first or second-tier level of approval if it is required within the business.

To view the timesheets that are pending approval:

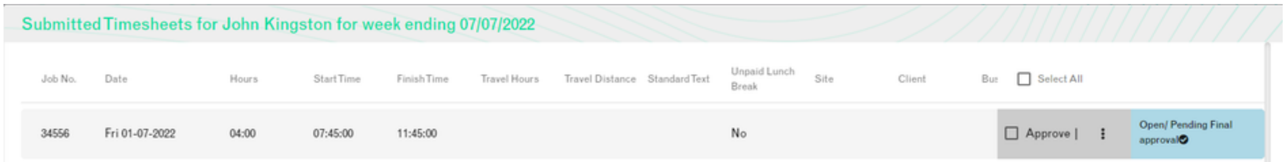
1. On the TOKN home page, select 'Manage' on the blue Timesheet Manager Widget.



2. Choose the period you would like to see the data from but select a start and end date, then select 'Filter'.
3. You will now be able to see all timesheets that have been assigned to you for approval in your selected period.



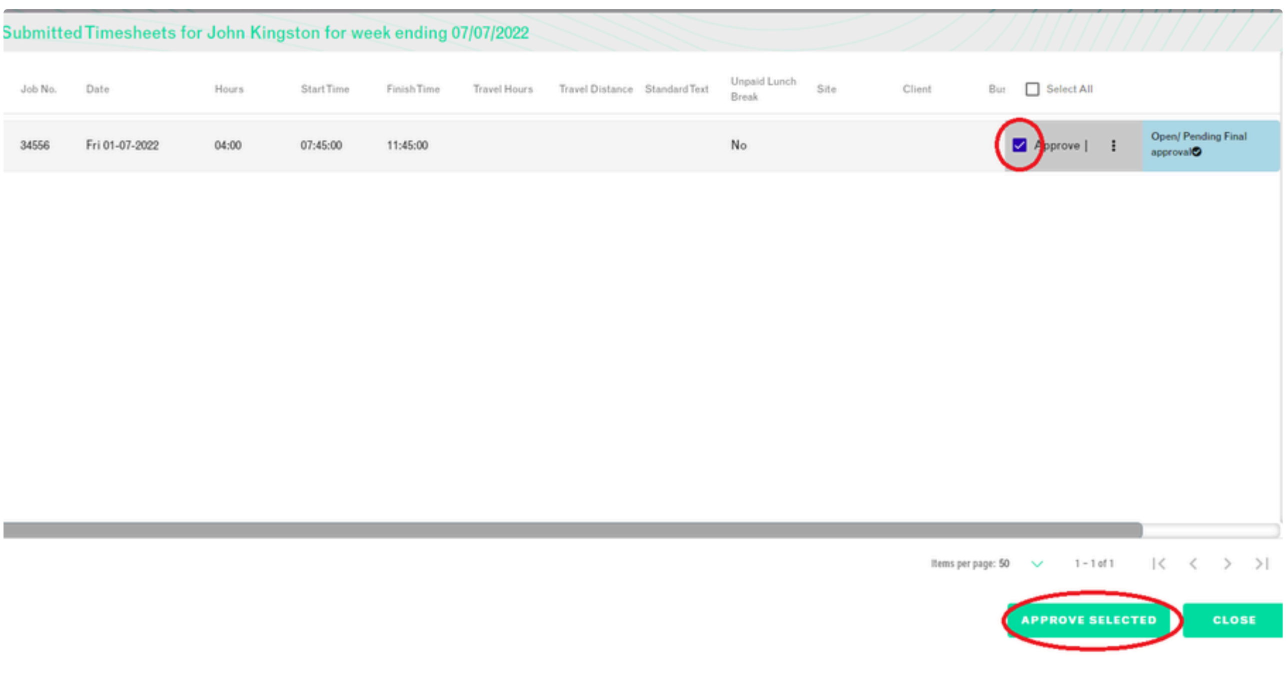
4. Select the week-ending period and the employee you would like to view the timesheets for. This will show you a breakdown by day of all the timesheets currently pending approval for that user for that week.



5. To view the signature associated with the timesheet, select the 3 dots to the right of the timesheet and select 'Signature'.

Q: How to Approve a submitted timesheet?

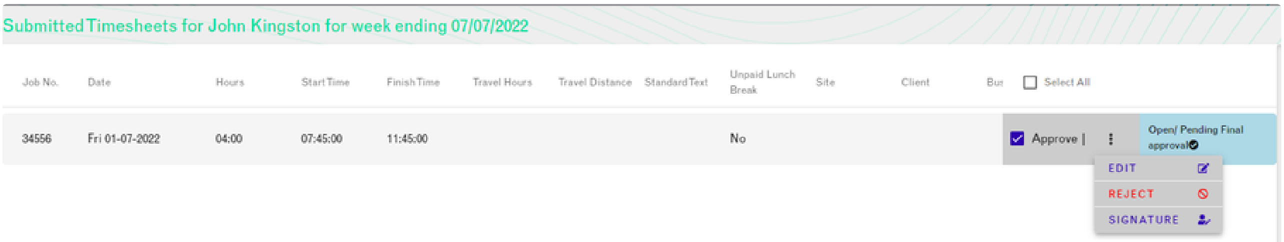
1. To approve a timesheet, select the week-ending period and the employee you would like to view the timesheets for. This will show you a breakdown by day of all the timesheets currently pending approval for that user for that week.
2. Select the timesheet(s) you would like to approve by selecting the checkbox next to 'approve' on the right-hand side of the timesheet. You can also select all timesheets by selecting 'Select All'.
3. Select 'Approve Selected' on the bottom right of the screen to approve all selected timesheets. This will send the details to your connected system.



Q: How to reject a submitted timesheet?

To reject a timesheet, select the week-ending period and the employee you would like to view the timesheets for. This will show you a breakdown by day of all the timesheets currently pending approval for that user for that week.

1. Select the timesheet you would like to reject and select the 3 dots to the right of the timesheet.
2. Select 'Reject' and then 'Yes' on the pop-up.



Q: How to edit a submitted timesheet?

1. To edit a timesheet, select the week-ending period and the employee you would like to view the timesheets for. This will show you a breakdown by day of all the timesheets currently pending approval for that user for that week.
2. Select the timesheet you would like to edit and select the 3 dots to the right of the timesheet.
3. Select 'Edit' and then edit the information for that timesheet as required.
4. If applicable, you can then re-send this timesheet for approval by selecting 'Resend Email' on the far right of the edit screen.
5. Select the 'Save' icon on the right of the screen to save your changes.

Q: What is the switch view report?

This gives you the option to filter the particular information that you need and export the report.

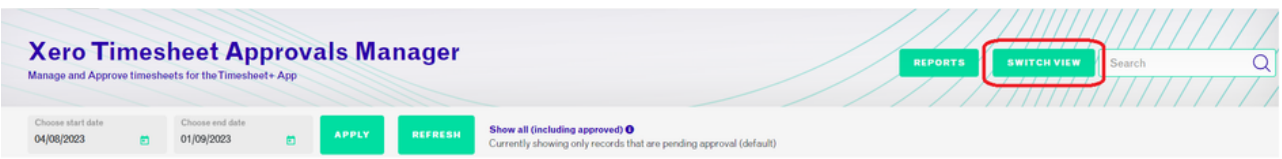
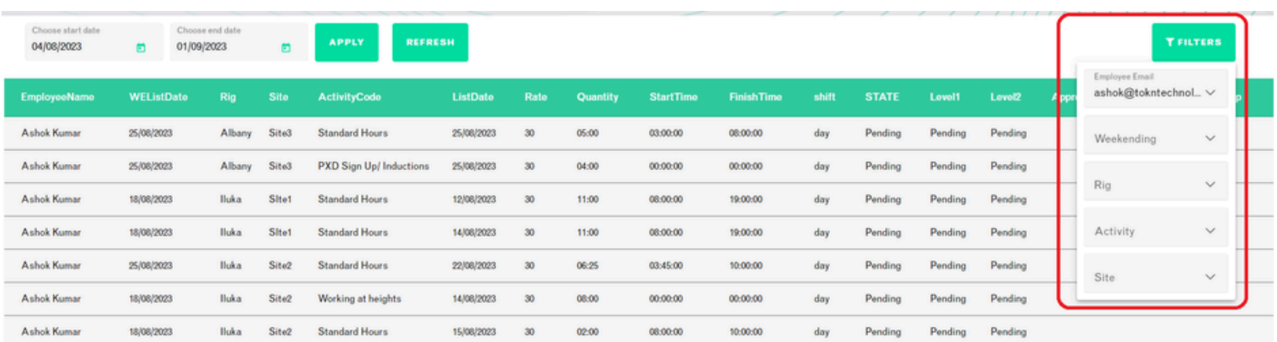


Figure 30: Switch the timesheet view (Console View)

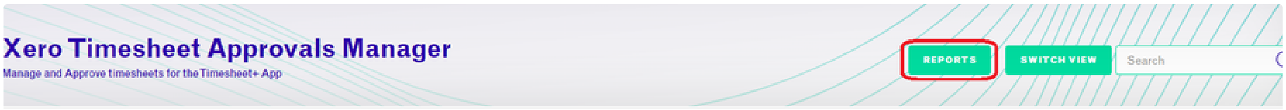
Users can sort the data and generate the pdf.

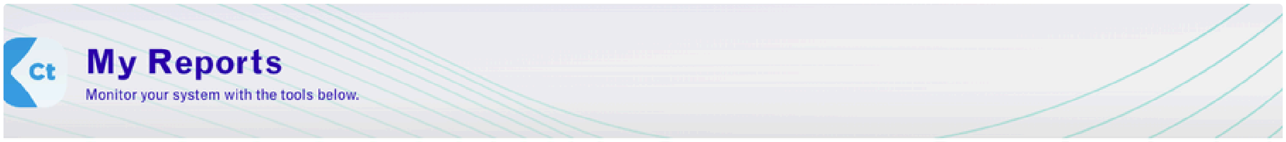


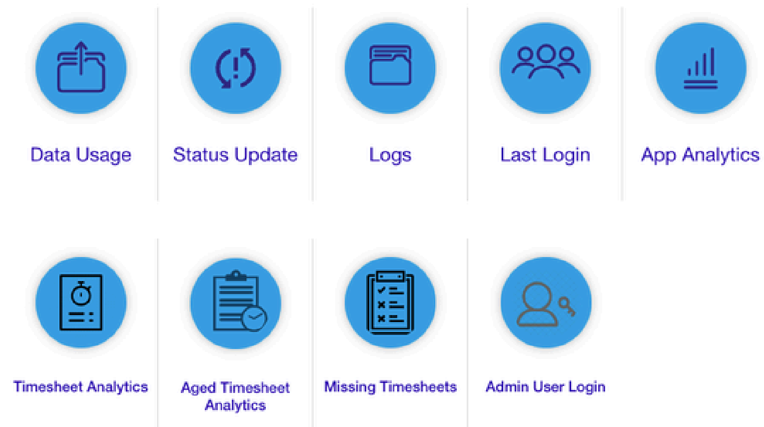
For creating a pdf or Excel sheet, just sort the data and click on the export pdf or export excel. It will generate the PDF for export pdf and the Excel sheet for export excel.

Q: What is an analytical report and different kinds of analytical reports can be created?

An analytical report is a process of exploring data to extract meaningful insights to better understand and improve business processes. Different analytical reports can be created to monitor the system. To generate these reports, click on the reports button under Xero Timesheet Approval Manager. From here users can create all the above-mentioned reports like data usage, Status update, Logs, Last login, and many more reports.





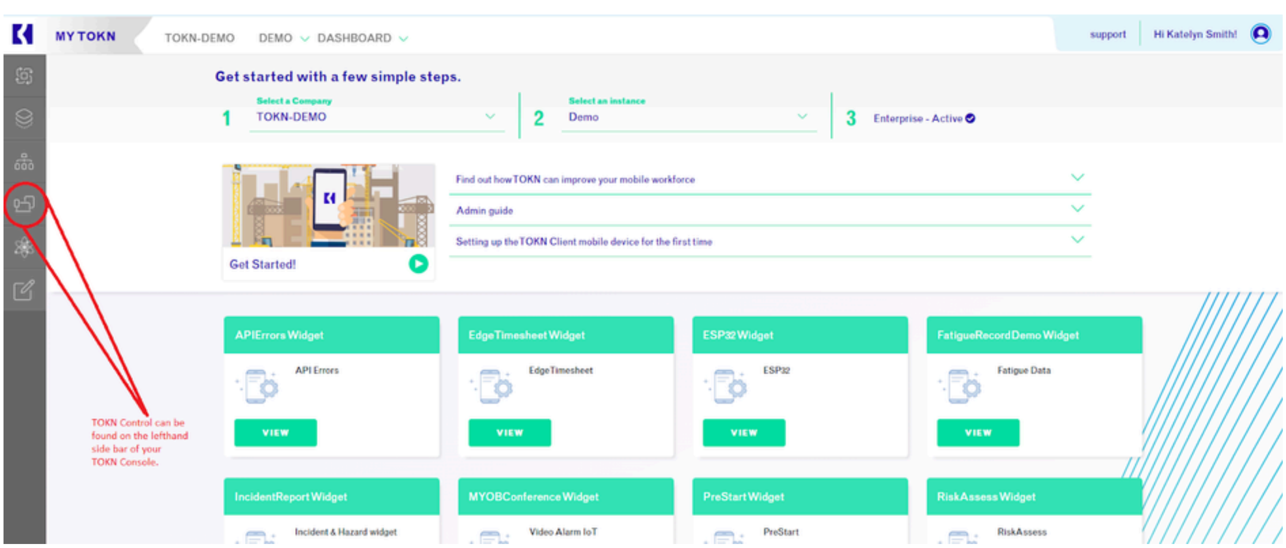


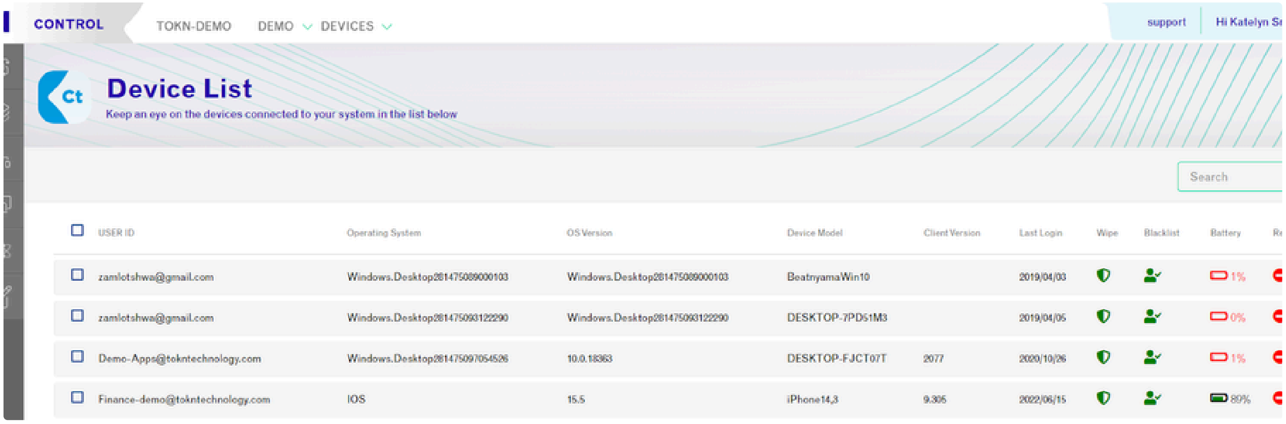
The main report would be the Missing Timesheet report - filter to the date range that you require.

The names that appear all have un-submitted Timesheets.

Q: How to see a list of connected users?

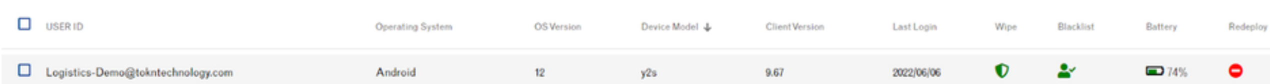
TOKN Control allows you to securely manage connected devices using the enhanced device management capability embedded within the module. TOKN Control provides a comprehensive device management framework, with a complete view of and control over all connected devices.





The TOKN Control will show you a list of connected users, as well as an array of other information, including:

- User ID/Email Address
- Operating System (iOS, Android, Windows) of the devices
- Operating System Version
- Device Model (type of phone)
- TOKN Client Version (which version of TOKN the user has on their phone)
- Last Login (the last time the user logged into TOKN)
- The user's mobile phone battery level



By using the filter options you can further define your search to be more specific.

Q: How to wipe a user's device from the console?

TOKN Control allows the administration user to remotely wipe devices of their TOKN data. Administrators can wipe TOKN from individual users ' phones. This allows for increased security where your data is kept private if a user's phone is lost, or stolen or if the employee leaves your business.

1. Select the user(s) you would like to wipe by selecting the tick box to the left of their name(s).
2. Select the green 'Wipe' button in the top right-hand corner of the screen and select 'Yes" on the drop-down.

Q: How to blacklist a user's device from the Console?

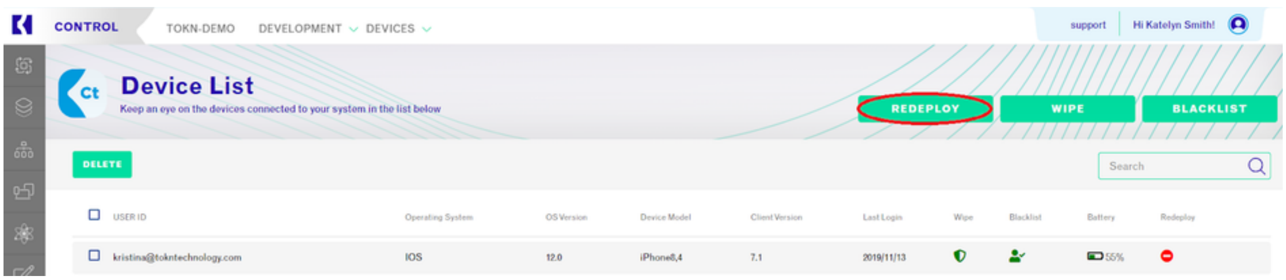
TOKN Control allows the administration user to remotely blacklist devices from using the TOKN app. This allows for increased security where your data is kept private if a user's phone is lost, or stolen or if the employee leaves your business.

1. Select the user(s) you would like to blacklist by selecting the tick box to the left of their name(s).
2. Select the green 'Blacklist' button in the top right-hand corner of the screen and select 'Yes" on the drop-down.

Q: How to deploy a user's device?

TOKN Control allows the administration user to remotely redeploy apps to devices from the TOKN Console. This allows for updates to users to be deployed instantly as required.

1. Select the user(s) you would like to redeploy to by selecting the checkbox to the left of their name(s).
2. Select the green ‘Redeploy’ button in the top right-hand corner of the screen and select ‘Yes” on the drop-down.



Q: How to check the user’s device location?

TOKN provides the functionality to track the location of users, based on the last place that they logged into the TOKN app. This can be found through the Device Locations Function in TOKN Control.

1. In the TOKN Control Module, at the top of the page, you will see ‘Devices’. Click on this and a drop-down menu will appear.
2. Select ‘Locations’. This will show you a map of the world, showing you where users are located. There is a toggle on the top left of the screen for a satellite view if required.